

Project Office Charter

The Information Technology Oversight Commission (ITOC) reviews all information technology projects above the agencies' limit of delegation authority. The mission of the Project Office is to periodically review the projects approved by ITOC and report their status regarding schedule and budget. The members of the Project Office are the ITOC systems consultants.

ITOC is interested in ensuring that the best practices in project management are employed to improve the chance of a successful project completion. As the project size increases, so does the risk associated with the project. But these risks can be overcome by good project management practices. These include early identification of issues, their impacts, and the strategies to resolve or mitigate them. Employing these management methods can reduce impacts on the project schedule and cost. While this may not guarantee the success of a project, it is unlikely that a project will be successful without these practices.

Goal

The goal of the Project Office is to identify and mitigate problems with large projects as early in the project as possible to minimize their impact.

Objectives

The objectives of the Project Office are:

1. To publish a project management policy
2. To establish a common project reporting format
3. To establish standards for project work plan development
4. To create project management and control language to be included in all IT BAAs, RFPs and contracts subject to ITOC review and approval
5. To ensure that change control mechanisms are in place and are being followed
6. To ensure that project overruns are identified early
7. To regularly report summary project status to ITOC
8. To participate in project steering committees

Process

Project Management Policy

The project management policy will define when the Project Office will review a project and what will be included in the review. Projects that require Commission approval will be reviewed at least quarterly. Usually the ITOC systems consultant assigned to the agency will conduct the review. The project manager and the project sponsor (in the agency) will present the project information. The detailed project plan, project change

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controls, project-to-date cost compared to budget-to-date, and issues and resolutions will be included in the review.

After the review, the ITOC systems consultant will prepare a project status summary that will include any concerns or follow-up actions related to cost or schedule along with the project information presented in the review. A copy of the summary will be given to the Commission members before their next Commission meeting.

Common Project Reporting Format

To effectively review multiple projects across multiple agencies, it is necessary to have a common format for reporting the status of projects. The work plan would need to be maintained in a standard project management package familiar to the Project Office (e.g., MS Project).

At the beginning of the project, a baseline of the project plan will be created. Project plan reports will include the original baseline as well as the current start and finish dates and the percentage completed for activities. The Tracking Gantt view of MS Project accomplishes this. Changes to the baseline must be approved by the agency and part of the formal change control process.

A staffing plan will need to be reported. The staffing plan will show the number of resources used and projected to be used by month during the duration of the project.

An issue log must be maintained. All issues that can impact the cost, time or resources required for the project need to be on the issue log. The date opened, the person responsible, the resolution, and the date closed also must be included.

Standards for Project Work Plan

The project work plan must include all the resources involved in the project, both State and contractor. Typically contractors are responsible for project management and the project deliverables (e.g., requirements definitions, design documents, coded and tested modules, system implementation). The State usually provides the business information in the form of subject matter experts. It is just as critical to the success of the project to schedule and track the subject matter experts as it is to schedule and track the technical resources. If any resources are not available when needed, the project schedule will suffer.

For large projects, the project plan may need to be divided into sub-projects. The lowest level project plan must contain activities that are no more than

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two weeks in duration. Percent complete is defined as the ratio of the number of hours of work already completed on the task or activity and the **current** total number of hours estimated for the activity (hours spent plus hours to complete). At least one deliverable needs to be produced every six months.

Contract Language

Language will be developed to be included in all large personal services contracts. The contract language will address the project work plan standards, the project reporting format, change control, project review process and frequency, and change budget. The language also will state that the contractor's cost for preparing and reporting these items needs to be included in the cost of the contract.

Change Control

As soon as it can be determined that there will be a change to the project cost or schedule, a change control must be approved. The change control must describe the requested change, the reason for the change, any alternatives, and the impact on the cost and the schedule. The project sponsor in the agency and the contractor must approve the change control. Change controls are expected to be charged against the change budget. However, if the change control exceeds either the value or the term of the contract, all the original signatories must approve a contract amendment.

Change Budget

Change is a normal part of any project. This can include a change in scope, a change in requirements, or unexpected events such as equipment delivery delays, service outages, and loss or unavailability of key personnel. These changes need to be planned for in the project cost and schedule. The agency needs to have a discretionary change budget that is included in the contract value. The nature of the project will dictate how much change control should be budgeted. 10% - 20% of the total contract value is a typical range for a change control budget.

Project Overruns

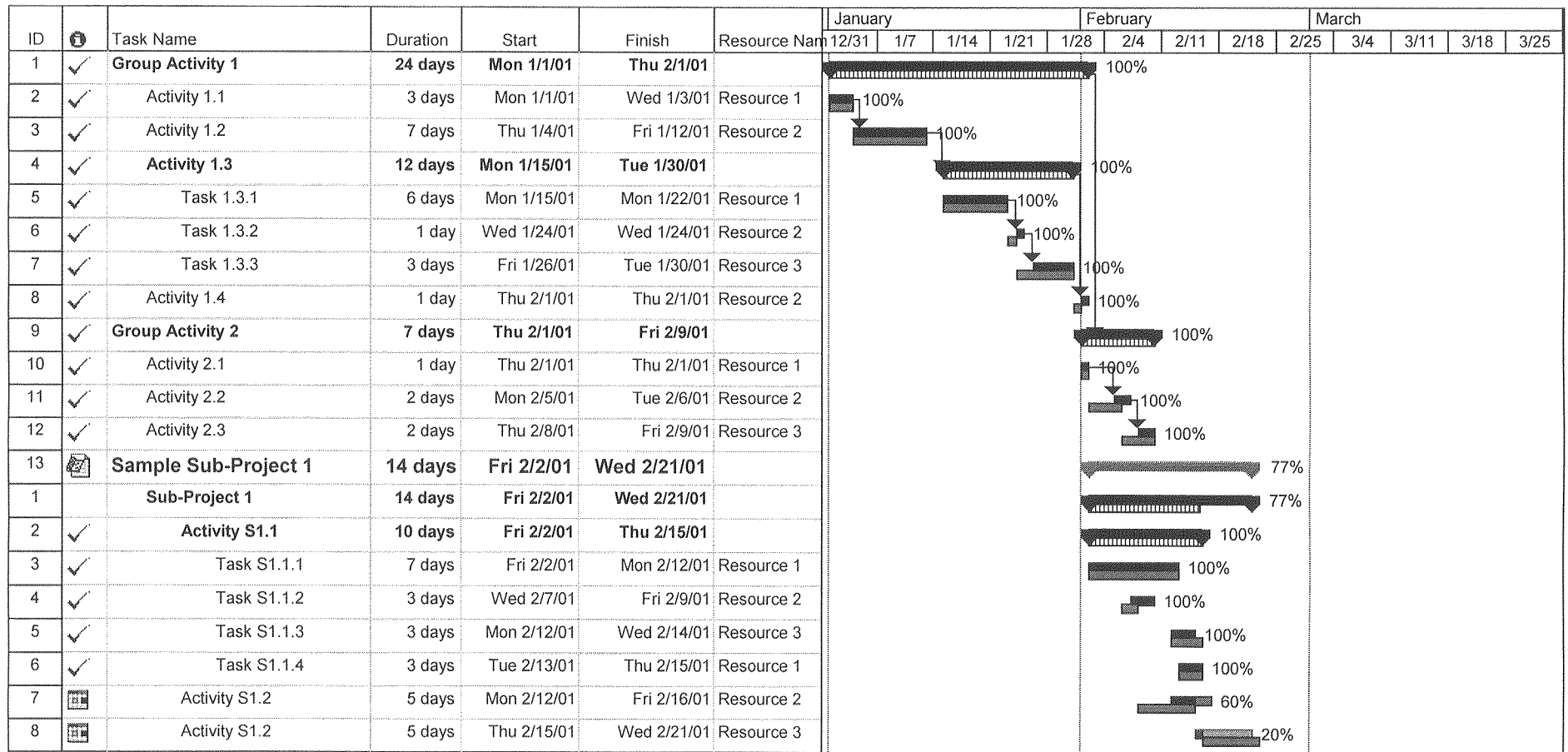
As soon as it is known that the contract value or the contract term will be exceeded, the contractor must inform the agency in writing. The agency, in turn, must inform their Budget analyst and ITOC systems consultant as soon as possible (not more than one week after receiving notice). As previously stated, a contract amendment must be prepared and approved by all the signatories to the contract.

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Sample Deliverables

Tracking Gantt
Staffing Plan (Resource Usage)
Issue Log Form
Change Control Form
Project Status Summary Form

Sample Tracking Gantt



Sample Tracking Gantt

ID		Task Name	Duration	Start	Finish	Resource Name	January					February				March			
							12/31	1/7	1/14	1/21	1/28	2/4	2/11	2/18	2/25	3/4	3/11	3/18	3/25
14		Sample Sub-Project 2	14 days	Fri 2/16/01	Wed 3/7/01														0%
1		Sub-Project 2	14 days	Fri 2/16/01	Wed 3/7/01														0%
2		Activity S2.1	9 days	Fri 2/16/01	Wed 2/28/01														0%
3		Task S2.1.1	7 days	Fri 2/16/01	Mon 2/26/01	Resource 1													0%
4		Task S2.1.2	2 days	Mon 2/19/01	Tue 2/20/01	Resource 2													0%
5		Task S2.1.3	4 days	Fri 2/23/01	Wed 2/28/01	Resource 3													0%
6		Activity S2.2	11 days	Wed 2/21/01	Wed 3/7/01														0%
7		Task S2.2.1	4 days	Wed 2/21/01	Mon 2/26/01	Resource 2													0%
8		Task S2.2.2	5 days	Thu 3/1/01	Wed 3/7/01	Resource 3													0%
9		Task S2.2.3	3 days	Tue 2/27/01	Thu 3/1/01	Resource 2													0%
10		Task S2.2.4	1 day	Tue 2/27/01	Tue 2/27/01	Resource 1													0%

Sample Staffing Plan

ID		Resource Name	Details	January				February				March				
				12/31	1/7	1/14	1/21	1/28	2/4	2/11	2/18	2/25	3/4	3/11	3/18	3/25
1		Resource 1	Work	24h		40h	8h	16h	40h	40h	40h	16h				
		Activity 1.1	Work	24h												
		Task 1.3.1	Work			40h	8h									
		Activity 2.1	Work					8h								
		Task S1.1.1	Work					8h	40h	8h						
		Task S1.1.4	Work							24h						
		Task S2.1.1	Work							8h	40h	8h				
		Task S2.2.4	Work									8h				
2		Resource 2	Work	16h	40h		8h	8h	40h	40h	40h	32h				
		Activity 1.2	Work	16h	40h											
		Task 1.3.2	Work				8h									
		Activity 1.4	Work					8h								
		Activity 2.2	Work						16h							
		Task S1.1.2	Work						24h							
		Activity S1.2	Work							40h						
		Task S2.1.2	Work								16h					
		Task S2.2.1	Work								24h	8h				
		Task S2.2.3	Work									24h				
3		Resource 3	Work				8h	16h	16h	40h	32h	40h	24h			
		Task 1.3.3	Work				8h	16h								
		Activity 2.3	Work						16h							
		Task S1.1.3	Work							24h						
		Activity S1.2	Work							16h	24h					
		Task S2.1.3	Work								8h	24h				
		Task S2.2.2	Work									16h	24h			

Sample Issue Log

[illegible]

Sample Change Control

Project Name: _____

Change Requested By: _____ Date: _____

Change #: _____

Description of Change:

Impact of Change (Cost and Schedule)

Approved By:

Project Manager

Date

Agency Project Sponsor

Date

Development Manager

Date

Sample Project Status Summary

Agency ID: _____

Summary Date: _____

ITOC Systems Consultant: _____

Funding Source: _____

Adherence to Project Schedule

Adherence to Estimated Budget

Project Issues

Project Changes

Concerns

Follow-up Action: